

Talking Points and Activities for a Lump Sum Peak Workload Kickoff Meeting


Prepared for the Departmental Human Resources Office

These talking points and activities are provided for the departmental human resources office to aid in planning a kickoff meeting for staff in preparation for the lump sum peak workload season.

Key Points

1. Important dates

- **5-Day Rule** - The Savings Plus Lump Sum Separation Pay Contribution Election Form ([Election Form](#)) must be signed, dated, and officially submitted by the employee at least 5 workdays (Monday through Friday, excluding Saturdays, Sundays and legal holidays) prior to the separation effective date. The written date on the completed form must follow this rule.
- To meet requirements around processing lump sum pay and tendering payment to the employee's retirement account(s), PARs/PPTs must be received by:

Separation Month	1st PAR Received at SCO by...	2nd PAR Received at SCO by...
September-October	ASAP	NA
November	12/12/19	12/27/19 
December	12/12/19	1/10/20

Note: PAR/PPT packages received by SCO after the dates specified will be processed; however, there may be charges assessed by CalHR to the agency/campus (as stated in [section 1802 of the CalHR Manual](#)) and/or a corrected W-2 for the 2019 tax year.

2. New: Lump Sum Separation Guide for the Departmental Human Resources Office (Guide)

- This Guide (1) identifies important steps to take and errors to avoid when preparing lump sum separation pay, and (2) links departmental human resources office staff to the manuals, tools, and other information useful for completing and submitting lump sum separation documents. Using the Guide will help ensure complete and accurate documentation and processing of lump sum documents. It was created to support and enhance eLearning as well as other formal training curriculum.

3. Suggested procedures and timeline around Lump Sum Separations

- Reach out to employees early with information that includes: (1) the Savings Plus Lump Sum Separation Pay Contribution Election Form; (2) their year-to-date accrued leave and contributions made to their Savings Plus account(s); (3) [457 Traditional Catch-Up](#) information.
- Encourage employees to submit their completed election form and other separation documents 30-45 days prior to their separation date.
- Timing is everything for peak workload! Submit PAR/PPT packages to SCO according to the dates above.
- You will receive a confirmation email upon SCO's receipt of the PAR. Do not send a duplicate or inquiry PAR at any time, as this may significantly impact processing time.

4. Activities for your team

<ul style="list-style-type: none">• Review the Guide as a team: What stands out as new or different?• Discuss annual contribution limits, as well as how employees include their 457 Catch-Up amount on the Election Form.	<ul style="list-style-type: none">• Review the updated Lump Sum Worksheet.• Try the new Lump Sum Pre-Tax Calculator.• Review the Payroll Letter 19-017 as a team.• Discuss your plan to meet the deadlines.
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